

Make Your Proposal Process More “Manageable, Efficient, and Effective” with Expedience Software

Current Situation

Before the purchase of Expedience Software, Resolution Capital was experiencing an “inefficient, labor-intensive RFP process that exhibited inconsistencies,” says Sharna Newman, Client Services Manager at Resolution Capital. “Spending hours searching through old documents trying to find a similar question and answer. Having to ask Portfolio Managers and the Operations team questions you know they have answered before, but you just can’t remember where, was very frustrating for all involved,” says Newman.

Solution

Expedience Software helps Resolution Capital accomplish their goals of making their RFP process more “Manageable, Efficient, and Effective”.

“Because we place so much importance around the quality of our answers, it’s great not having to waste our time doing non-productive things like chasing down information,” says Newman. “Our firm FUM has had substantial growth over the last few years as a function of market growth and new client accounts. With the increase in clients comes an increase in deliverables: Due Diligence Questionnaires, RFP’s, RFI’s, Business Continuity Questionnaires, ESG Surveys, Operational Questionnaires and more. We needed a solution that could support our requirements in both Word and Excel formats.”

“I’m so pleased that we have Expedience Software on board here at Resolution Capital,” concludes Newman. “The Sales and Professional Services teams at Expedience have been awesome to deal with, very friendly, and responsive. As a result of using these tools, we’ve experienced labor and time savings. We also now have a consistency of formatting information which allows us to present uniformity to the client. Implementing Expedience has led to shorter turnaround times, higher quality responses, and an all-round more efficient process. I can’t stress enough how valuable these products have been to us at Resolution Capital. These are tools that will carry us well into the future, giving us the capability to work in a more professional, efficient, and effective manner.”

About Expedience Software

Expedience Software creates fast, accurate, and beautiful proposals directly from Microsoft Word! Automate RFP & RFI responses (even Excel RFPs!), FAQs, DDQs, SOWs, Questionnaires, PowerPoint presentations, and more! With more than 20 years of proposal automation experience, Expedience is the premier solution for sales and proposal professionals in financial and asset management, healthcare, legal, manufacturing, and technology organizations.

RESOLUTION CAPITAL

Company

Resolution Capital Limited

Industry

Resolution Capital is a specialist global real estate securities manager.

Project Lead

Sharna Newman, Client Services Manager

Critical Issue

Creating a “manageable, efficient and effective” RFP Process.

About Resolution Capital

The firm was established in 2004 and is headquartered in Sydney, Australia and maintains an office in New York. They believe that listed real estate is an excellent means of gaining exposure to the underlying returns of some of the world’s highest quality real estate assets in a simple, transparent, liquid and tax efficient form. Clients include leading institutions from around the world. Institutional clients include pension funds, financial institutions, multi manager groups and family offices. Resolution Capital also currently manages a number of Funds for Australian and New Zealand investors, and a UCITS CCF for global investors.

Award Winning Fund Manager

Professional Planner / Zenith Awards 2018, Global REIT Manager

